

NIGER Food Security Outlook

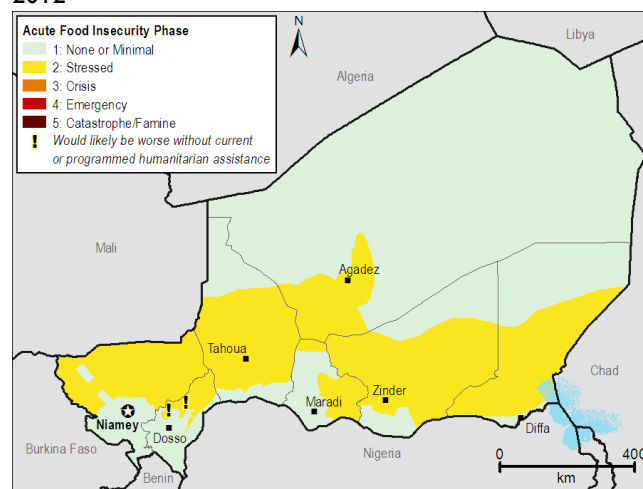
April through September 2012

- Given good market performance and regional conditions which favor imports to Niger, national food availability is generally sufficient to meet consumption demand. However, in some remote areas—particularly in agropastoral areas of Tillabéri, parts of Aïr, and western pastoral areas — supply is below normal levels.

- The arrival of 26,540 Malian refugees since the beginning of January has increased cereal demand by approximately 460 MT per month. The food needs of this refugee population are currently being met by humanitarian aid organizations. However, the government assistance plan does not take refugee food needs into account.

- In general, grain markets are performing well and prices have been stable since last month, though they remain 20 to 30 percent above the same time last year and the five-year average. Current food aid programs are not expected to significantly reduce grain demand, which is expected to remain strong between May/June and September, fueled by the return of migrant workers, the influx of refugees, and consumption requirements associated with the observance of Ramadan.

Figure 1. Estimated current food security conditions, April 2012

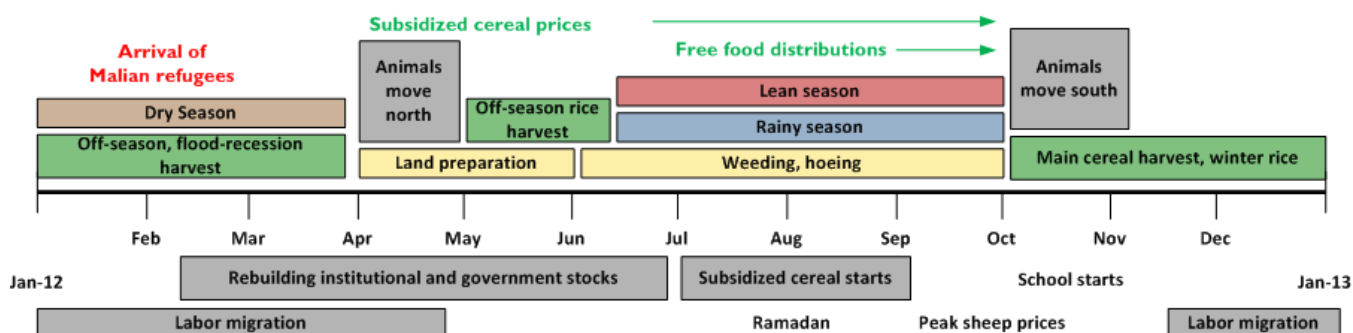


Source: FEWS NET

For more information on FEWS NET's Food Insecurity Severity Scale, please see: www.fews.net/FoodInsecurityScale

- In agropastoral areas of Filingué, Ouallam, Tillabéri, and Téra departments, food insecurity will reach IPC Phase 3: Crisis in July, August, and September due to mediocre 2011 harvests, high cereal prices, and an assumption that likely emergency assistance will be insufficient to fully meet needs.
- Contrary to assumptions made in January, migrating livestock did not leave early or have returned to Niger due to conflicts in Mali and Nigeria. As a result, the depletion of rangeland resources is more rapid than expected in the pastoral departments of Abalak, Tchintabaraden, and Tanout, and food insecurity in these areas ranges between IPC Phase 2: Stress and Phase 3: Crisis. Despite the unexpected presence of these animals, livestock body conditions and prices remain stable.

Seasonal calendar and timeline of critical events



Source: FEWS NET

Most likely food security scenario for April through September 2012

Final performance figures for the 2011 winter growing season released by the statistics unit attached to the Ministry of Agriculture at the end of March put per capita available output at 188 kg, compared with a per capita consumption requirement of 231 kg, leaving a 43 kg shortfall. Carry-over on-farm inventories are estimated at 113,034 MT, which puts per capita food availability at 7 kg. According to mid-term harvest assessments by the Ministry of Agriculture, the grain equivalent from market garden crops is 320,540 MT, for a per capita gross output of 20 kg. Thus, adding all these figures, a comparison of per capita gross food availability and needs shows a small nationwide per capita grain availability deficit of approximately -16 kg, versus an estimated 29 kg average per capita surplus for the last five years. However, projected commercial imports are estimated at approximately 400,000 MT, equivalent to 25 kg per person, and import capacity may even be underestimated. Thus, thanks to good market performance and to what are currently favorable subregional conditions for imports to Niger, there is sufficient if not excess food availability to meet consumption demand.

This year, the successive waves of 26,540 Malian refugees flooding into the country since the beginning of January have boosted consumption demand by approximately 460 MT per month. The food needs of this refugee population are currently being met by humanitarian aid organizations.

Contrary to assumptions made in January, due to the conflicts in Mali and Nigeria, a large part of the country's transhumant animal population never left their home base or returned earlier than usual, by March/April in lieu of in June/July, as is normally the case. The condition of pasture resources is deteriorating at a much faster rate than anticipated in January. The unexpected presence of these transhumant animals has not yet significantly affected their physical condition, which is generally acceptable, with a relatively good balance between supply and demand on livestock markets.

According to Livestock Market Information System (SIMB) data for the month of March, livestock prices were stable compared with previous months and above seasonal averages, putting terms of trade for male goats/millet 10 to 17 percent above the five-year average. With milk supplies at 50 percent below-average and prices at double the average, there should be no radical changes in income from milk sales.

In general, grain markets are performing well (with rapid pass-throughs of price movements from market to market and average to good supply levels). On the whole, prices have been stable since last month, though March prices for coarse grains (sorghum, corn, and millet) were between 206 and 260 XOF/kg, or 16 to 38 percent above the seasonal average, edging up another 2 to 4 percent in the first few weeks of April. However, with the low demand on tertiary markets in remote at-risk areas for food insecurity—particularly in agro-pastoral areas of Tillabéri, parts of Aïr, and western pastoral areas—in some cases, supplies are not as good as they should be.

There is a comparatively large demand for millet, the preferred cereal for consumers in Niger. This is reflected in differences in market prices, with local millet crops commanding higher prices than imported millet from Nigeria and other locally grown grain crops. The main sources of food access in April were sales of market garden crops, straw, and firewood, and wage labor. Falling prices for market garden produce in general and onions in particular due to a market glut are curtailing food access in high-production areas, particularly in the Aïr Mountains.

The first round of the assistance program for at-risk populations, beginning in November of last year and running through January of this year, helped a total of 105,000 households, including 70,000 households through cash-for-work activities and 35,000 households through food-for-work activities, providing the financial equivalent of approximately 7.88 billion CFA francs worth of aid.

There was a large (67 percent) jump in admissions of malnourished children to health centers between February and March. However, this is not necessarily unusual. According to historical data for 2007 through 2011, on average, admissions rates double between January and May, sometimes spiking earlier in the year, in the first quarter (in 2007, 2008, and 2011), and sometime spiking later in the year (in 2009 and 2010). Though higher than in the past, the absolute number of admissions is also not necessarily unusual (approximately 22,000 cases of severe acute malnutrition were reported in March of 2011 and March of 2012). Field research shows that monthly fluctuations in admissions figures could be attributable to major discrepancies in reporting, screening, or assistance from one month to another. However, a

continuation of the same nationwide trends observed between February and March into April and beyond would be an aberration. The sharp steady increases in admissions rates reported between January and March in certain departments, particularly in the Tillabéri region and in other localized areas, are probably attributable to higher levels of acute food insecurity and have been taken into account in the analyses and maps presented in this Outlook.

Basic assumptions for the period from April to September 2012

The scenarios described on the following pages are supported by certain basic assumptions with respect to future developments in the nationwide situation, as outlined below:

- The current status quo with respect to the balance of power in Mali will be maintained, with increasingly frequent acts of banditry along the country's northern border with Niger, but without producing any further large-scale population movements or major disruptions in cross-border trade in grain or livestock.
- There has been a large improvement in security conditions and informal grain trade in Nigeria since the unilateral closing of its borders, though trade flows have not rebounded to their pre-closure levels. Tuber crops, corresponding byproducts, and market garden crops have not been affected by the embargo.
- More important is the procurement by humanitarian organizations of 30,000 (of the solicited 70,000) metric tons of grain on wholesale markets in Nigeria. According to traders, these procurements are the reason for the rise in millet prices in Nigeria from 6000-6200 nairas in late February to 7500 nairas by April (by more than 20 percent). This institutional demand is likely to keep wholesale grain prices high and trigger sharper than expected rises in prices in the Sahel, at least until the release of trader inventories with the normal start of the rainy season in June.
- The rainy season will get off to a normal start in farming and agropastoral areas in May/June and in pastoral areas in July/August and progress normally.
- Markets will be well-stocked with grain thanks to domestic and foreign trade, with an increasing volume of imports between April and July compared with figures for March.
- Government-subsidized grain sales will proceed normally between April and June, complemented by targeted distributions of free food aid and the blanket feeding program in July, August, and September in areas classified by the government as food-insecure.
- There will be continuing assistance programs for the refugee population between June and September. Demand pressure, fueled by the influx of Malian refugees, the return of seasonal migrant workers in May/June, and the observance of Ramadan (from mid-July to mid-August), will produce abnormally steep rises in prices in June, July, August, and September, with seasonal spikes of five to ten percent.
- Demand for small animals will increase sharply in anticipation of the celebration of Tabaski in October, peaking in September. Prices for small animals will be 25 to 35 percent above-average by July.
- There will be a normal demand for local farm labor between June and September.
- As usual, cash and food-for-work programs will create gainful employment opportunities between April and May.
- There will be normal harvests of local and irrigated rice crops in June/July in areas along the banks of the Niger River and other major waterways.
- In line with normal trends, admissions to health facilities in Niger for acute malnutrition will increase between June and September. With current improvements in reporting and treatment capacity, nationwide admissions figures will outstrip last year's numbers for the entire outlook period. Global acute malnutrition rates will exceed background levels (which are already above World Health Organization emergency thresholds) in at-risk areas classified in Phase 3 (crisis) of the IPC acute food insecurity scale.

In general, a combination of normal local coping strategies and food aid programs kept food insecurity levels for April of this year in Phase 2 (stress) according to version 2.0 of the IPC scale. With the decline in income and comparatively high prices of consumer goods in May and June, the North, agro-pastoral areas of Tillabéri, and pastoral areas will move into IPC Phase 3 (crisis), as will farming areas of Tessaoua, Magaria, and Matameye and the northern and central reaches of Tillabéri, Téra, Ouallam, and Filingué departments, particularly at the height of the lean season for farming and agro-pastoral households in July, August, and September (Figures 2 and 3).

Agropastoral areas of Filingué, Ouallam, Tillabéri, and Téra departments

A total of 26,650 refugees and 2,390 returnees flooded into the country between January 25th and April 5th of this year at the rate of 25 to 300 new arrivals per day throughout February and March. Most of this population is concentrated in Abala/Filingué, Ayorou/Tillabéri, Sinégodarm, and Mangaizé/Ouallam. The government and humanitarian organizations are providing most of their food. There are still no visible signs of any major impact on grain, livestock, or labor markets, where prices have been stable since December/January, a month before the arrival of the first wave of refugees. The quantity and quality of emergency aid programs for refugees at the Ayorou and Mangaizé camps are more than adequate. The Abala camp is being supplied with rice in lieu of millet and has the best sanitary and sanitation facilities. However, there is some degree of vulnerability in terms of the effect of health conditions, particularly on malnutrition rates for refugees at the Ayorou and Mangaizé camps.

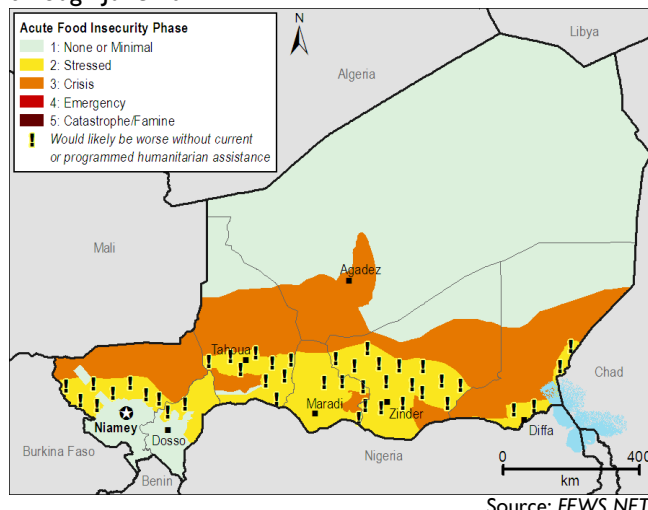
Grain markets

Markets are extremely well-stocked with grain. Supply levels are 10 to 20 percent above-average, in line with household demand fueled by the poor 2011/12 harvest in this area. The Ayorou (Tillabéri) and Mangaizé (Ouallam) markets are each getting regular supplies of 50 to 80 metric tons of grain per week from Nigerian traders. These markets, in turn, are the main sources of supply for Nigerian livestock traders and for villages in which there is a comparatively higher demand for grain than in other parts of the country due to the larger grain deficit in this area.

Market performance in meeting grain demand has been more or less normal. Consumption demand remains strong, fueled by production shortfalls in this region. Market prices, though relatively stable compared with previous months, are 20 to 30 percent above figures for the same time last year and the five-year average. The main staple foods are millet and local varieties of rice (in riverside villages). Prices in Ouallam, Filingué, Tillabéri, and Téra departments, which had an especially poor millet harvest (a dietary staple), are very high, but there were no dramatic spikes in prices in the first three months of the year. Prices for substitute foods like sorghum and corn are lower than staple food prices (prices for millet and local rice).

As of the third week of March of this year, 100 kg sacks of millet and sorghum were selling for 21,500 and 20,000 XOF, respectively, in Ayorou (Tillabéri), compared with 25,000 and 23,000 XOF, respectively, in December of last year. This price trend was bolstered by a good rice harvest compared with last year. In some villages, rice consumption accounts for approximately 60 percent of food intake by river-dwellers, who consume 30 to 70 percent of their crops.

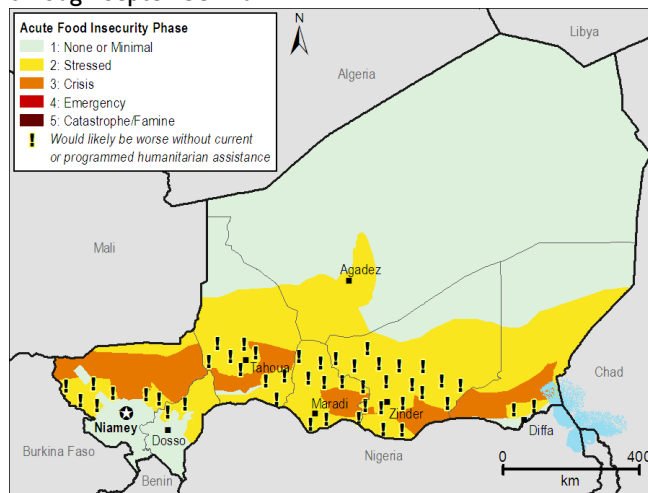
Figure 2. Most likely food security outcomes for April through June 2012



Source: FEWS NET

For more information on FEWS NET's Food Insecurity Severity Scale, please see: www.fews.net/FoodInsecurityScale

Figure 3. Most likely food security outcomes for July through September 2012



Source: FEWS NET

For more information on FEWS NET's Food Insecurity Severity Scale, please see: www.fews.net/FoodInsecurityScale

Sources of income

Many local villages, particularly in the southern reaches of this area, produce large harvests of market garden crops, mainly potatoes, onions, lettuce, tomatoes, cabbage, and sweet potatoes. The planting of a more than 40 percent larger than usual area in these crops and the provision of significant amounts of aid (30-50 percent more than usual) in the form of farm inputs (potato, corn, cowpea, sweet potato, onion, tomato, cabbage, lettuce and other seeds, cassava cuttings, etc.), fertilizer, small farming implements, and power-driven pumps contributed to this year's good harvest. These different types of aid and the involvement of the local population boosted production to between 20 and 60 percent above-average. Such a good harvest has created a market glut and eroded terms of trade for market garden produce by 20-60 percent compared with last year (Figure 4). Thus, virtually all high-production areas are turning to crop conservation strategies to help them get through the lean season. These inventories could cover food consumption needs for one to two months, depending on the farm family in question. Poor households also keep three or four small animals (sheep and goats) as an integral part of their livelihoods. The sale of a male goat is currently bringing in 50 kg of millet, with a male sheep bringing in 100 to 150 kg of millet, compared with an average of 100 to 200 kg of millet per goat and 300 to 400 kg of millet per sheep.

Assistance

Government-subsidized marketing programs were mounted in all departments and municipalities (*communes*) in this region in two rounds, selling 2,605 metric tons of grain in February and another 3,385 MT of grain in March. The national food security reserve for the Tillabéri region currently

has 7,545 metric tons of grain allocated to the Strategic Food Reserve, a government reserve generally used only in emergencies for distributions of free food aid. Government-subsidized grain sales will be staggered over the next few months in several rounds, at the rate of 3,385 metric tons per round. These sales will be complemented by cash-for-work and food-for-work activities distributing over 800 million CFA francs and more than 22,442 metric tons of grain to participating households in the Tillabéri region.

Figure 4. Terms of trade for millet/miscellaneous items sold in March

Item	Millet equivalent		Percentage change
	March 2011	March 2012	
1 kg of potatoes	1.94 kg	1.56 kg	-20%
1 kg of onions	0.79	2.04	-61%
1 kg of tomatoes	1.82 kg	1.25 kg	-31%
1 kg of cabbage	1.18 kg	0.63 kg	-47%
Bundle of straw	4.4 kg	6.3 kg	+43%
Bundle of firewood	1.94 kg	3.15 kg	+62%
Wage labor	5.56 kg	5.46 kg	-2%

Source: SIMA, FEWS NET

Food security outcomes for April 2012

There was a large improvement in food access in March with the sale of market garden crops and the relief programs mounted by the government and its partners. In general, most households regularly consume adequate quantities of popular foodstuffs in this region, including millet, local varieties of rice, corn, and sorghum. However, the main dietary staples are millet and local rice (in villages on the banks of the Niger River), with corn and sorghum serving as substitute foods. Right now, there is very little demand for these substitute foods, which could explain their low prices compared with prices for millet and rice.

The malnutrition rate in this region at the time of the latest survey conducted in October of last year was 13.1 percent, compared with 16.1 percent in October of 2010. However, the number of cases of child malnutrition reported by health centers in March of this year was up sharply from previous months and from March of 2010, a crisis year from a food security standpoint.

However, the number of reported cases of child malnutrition in March of last year (a year generally marked by no or minimal acute food insecurity) was also significantly higher than in 2010 (a year marked by acute food insecurity), which is further proof that the factors driving malnutrition rates are not all food-related. According to health officials, for the most part, these larger malnutrition figures are attributable to the mass screening programs mounted in certain villages in this region. This is precisely the case in Ouallam department, which mounted a mass screening program in March of this year. Monthly swings in the number of cases of child malnutrition are a function of the availability or unavailability of therapeutic foods for distribution by treatment facilities. In fact, it was discovered that mothers will regularly bring children receiving daily food rations to corresponding health centers. Furthermore, child health is also a contributing factor in malnutrition problems.

With at least 20 percent of local households dependent on food aid to meet their food needs, this area is classified in IPC Phase 2 (stress).

Food purchases have begun earlier than usual and market-buying will be the main source of food between now and September. Food aid in July, August, and September will strengthen food access but will not meet 100 percent of the needs of all very poor and poor households due to the current influx of refugees, who had not been taken into account in the government's assistance plan for at-risk households. Thus, food aid programs will not significantly reduce grain demand, which is expected to remain strong between May/June and September, fueled by the return of migrant workers, the influx of refugees, and consumption requirements associated with the observance of Ramadan. Markets will be well-stocked with foodstuffs, but prices will stay high, spiking in July and August. There will be limited food access through September, with a deterioration in child malnutrition rates, which will fluctuate between 11 and 16 percent throughout this period and thereafter. Cash and food-for-work programs and distributions of free food aid will not be targeted at the refugee population and, thus, will prove inadequate, with their limited coverage failing to provide all very poor and poor households with sufficient food and/or income.

Food insecurity levels will reach « crisis » proportions in July, August, and September due to the inability of assistance programs to meet the needs of the above-average numbers of at-risk households in this area. Rates for wage labor, the sole source of income at that time of year for the larger than usual numbers of area households, should be on par with the norm.

Very poor and poor households will be in IPC Phase 2 (stress) in May/June, with any unmet food consumption needs covered by assistance programs. The food access and food intake of this group of households will be sharply curtailed in July, August, and September, with high demand and above-average grain prices preventing their securing large enough quantities of grain to meet their needs, even with food aid.

Thanks to progress in disease prevention, mortality rates should not exceed normal threshold levels. However, with current trends in nutrition indicators and a 50 to 100 percent jump in admissions rates for malnutrition, there could be a sharp rise in mortality rates during the prime period for seasonal illnesses, which could put the area in Phase 3 (crisis) of version 2.0 of the IPC scale in July, August, and September.

Pastoral areas of Abalak, Tchintabaraden, and Tanout departments

This potential problem area has a population of approximately 483,000, equal to 38 percent of the total population of nomadic and transhumant pastoral areas. Livestock-raising (cattle, sheep, goats, and a few camels) is the mainstay of the local economy and annual rainfall is between 100 and 200 mm. Normally, 40 to 90 percent of household food supplies are purchased on the market. The main sources of income for poor households are typically sales of livestock (April-May/June), milk and dairy products (June-December), straw (April-June), and firewood (April-June) and the tending of animals (June-December).

Pasture supplies are currently limited due to the earlier than usual return of transhumant animals to this area and resulting higher than usual stocking rates. The *Habbanayé*¹ system of mutual aid/community assistance based on gifts of livestock is not functioning as well as usual due to the approximate 30 percent reduction in herd size with the herd thinning measures taken in response to the 2010 pastoral crisis. Very poor and poor households will be in IPC Phase 2 (stress) in May, with food aid, income from sales of straw and firewood, and food purchases with income from sales of livestock bolstering their food security. As the rainy season in pastoral areas settles in between August and September, there should be an improvement in pasture production and in the physical condition of livestock, boosting their market value and milk output. Thus, though environmental conditions are worse than expected, they should not significantly affect food security outcomes.

¹ Under the so-called *Habbanayé* system, an individual is entrusted with the care of a heifer or female goat and, in return, is gifted the first or two first-born calves or kids.

Market gardening areas of Arlit and Tchirozérine departments on the Aïr plateau

This area has a population of approximately 287,000. Irrigated farming activities are the mainstay of the local economy of this area, which includes the Aïr Mountain region. The two main cash crops are onions and potatoes, though onions are the area's most valuable crop. The main source of income is the sale of onion crops, supplemented by wage labor and sales of firewood, straw, and small animals. Investments in onion-growing activities (purchases of farm inputs and hiring of farm workers) for the current growing season were larger than usual.

This year's favorable production conditions created a surplus of onions (from a 30 to 50 percent above-average harvest) which, combined with an extremely weak domestic and foreign demand (reducing normal onion exports by 70 percent), caused sales to slump and prices to plummet. Terms of trade for onions/millet are 70 percent lower than at the same time last year. As a result, middle-income and better-off households unable to recoup their investments have not paid members of very poor and poor households for their labor. This loss of income, in turn, is curtailing the usual market access of this group of very poor and poor households.

Table 2. Less likely events liable to change the above scenarios in the next six months

Area	Event	Impact on food security conditions
Nationwide	Late start and/or poor progress of the rainy season	This would prompt traders to hold onto their inventories, triggering a sharper than expected rise in grain prices, particularly between June and September. The physical condition and prices of livestock would be worse than usual, particularly in May, June, and July.
	Sharp appreciation in the value of the Nigerian naira	There would be a higher demand in Nigeria for grain and livestock from Niger.
	Restrictions on grain trade	The disruption in the flow of grain trade would tighten market supplies and cause prices to spike.
	Locust invasions	There are reports of large-scale locust infestations in Algeria and Libya. Locust invasions between May and July would reduce pasture availability and require multiple replantings of crops for the main growing season. Locust invasions between August and October/November would cause enormous damage to crops.
Agropastoral areas of Filingué, Tillabéri, and Téra	Larger than expected volume of food aid	Excellent program coverage, larger than expected incomes and food supplies
	Peaceful ending to the conflict in Mali and repatriation of Malian refugees	Normalization of grain demand; slightly higher than average prices
Western pastoral areas	Flooding, road closures	Low supplies on area provisioning markets; spike in food prices
Market gardening areas of Aïr	Outside intervention for the payment of lucrative prices for onion crops	Improvement in farmers' purchasing power; payment of outstanding wages to farm workers
	Good potato and corn harvest in April/May	Sales of crops at competitive prices and boost in farm income
	Assistance for the next growing season	Upgrading of the area; onion production according to the normal production cycle in this area